

## Requesting Access or Changes for New or Existing Users

PeopleSoft User ID's for the Financials applications (which includes the Purchasing module) are administered by the GMIS Office of IDOA. Following are the usual administrative steps in the process.

### Step 1. A request is initiated by an agency

This can be as simple as requesting that "John Doe" be given access to the Accounts Payable module. Usually, the request will come from the manager of the particular business area (for example, the designated Procurement Agent for the agency for eProcurement or Purchasing access, or perhaps the agency controller for other financials modules). Just fill out a form from the "Report an Issue" link on the PeopleSoft sign-on page. Or, emails can be sent to:

[GMISpasswords@doit.in.gov](mailto:GMISpasswords@doit.in.gov)

\*\*\* Also "Report an Issue" when a user transfers, terminates, or no longer needs PeopleSoft access \*\*\*

### Step 2. User Access Request Form is created and sent to the agency.

We track these requests in a database and a particular user may have multiple records. That way we can track how a user got to a particular access level and who approved it.

*(Note: The format of the form may vary depending on the type of access)*

**GMIS Security: User Access Request**

Request Type:

1289 Database(s):

Last Name:  First Name:  MI:  Operator ID (if any):  Telephone /  Ext.:

PR-HR Employee #:  Email Address:

Auth Agency Number(s):  Job Title:  Supervisor:

Agency/Division:  Title:

Location:  Phone:

**Specific GMIS Access**

Indicate the access required for the User by marking the appropriate areas:

Role	Add	Delete
eProcurement / Purchasing	<input type="checkbox"/>	<input type="checkbox"/>
Requester	<input type="checkbox"/>	<input type="checkbox"/>
Buyer	<input type="checkbox"/>	<input type="checkbox"/>
Agency Approvers		
Agency Procurement Agent	<input type="checkbox"/>	<input type="checkbox"/>
Agency IT Approver	<input type="checkbox"/>	<input type="checkbox"/>
Agency Fiscal Approver	<input type="checkbox"/>	<input type="checkbox"/>
Agency Management Approver	<input type="checkbox"/>	<input type="checkbox"/>
Other		
Accounting Object Change	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

**User Defaults**  
(If Desired)

Accounting Info: Fund  Center  Dept.

Location Info: Office Location  Ship-To Location

**User's Certification**  
I have read the accompanying GMIS System Employee Use Agreement, fully understand it, and agree to abide by it as a condition of my employment.

Employee Signature:  Date:

**Agency Review / Approval**

Supervisor Signature:  Date:

Procurement Agent Signature:  Date:

**GMIS Review / Approval**

GMIS Functional Manager:  Date Approved:

GMIS Technical Manager:  Date Approved:

Security Administrator Signature:  Date Completed:

### Step 3. Complete the form.

The agency user and/or supervisor complete the top portion of the form including specifying the agency number(s) that this user will have access to.

The "Specific GMIS Access" section varies by application. This section is usually completed by the relevant manager.

If the agency knows the Security Roles that are needed, they will check the appropriate boxes on the form or list the capabilities in the Comments box.

The user and the supervisor sign the form. For eProcurement/Purchasing access, the agency Procurement Agent also signs.

### Step 4. Return the form.

Send or Fax the form to:

GMIS Security Administrator  
IDOA — GMIS  
IGCS, Room 470  
Fax: 317-234-2231

### Step 5. Setup the user's security.

The GMIS Support Team uses the form as the specifications for setting up or updating the requested user's access.

Users are usually emailed their ID/Password information and the agency's contact person is notified when this is complete.